

011 - CLERK OF THE BOARD

Operational Summary

Mission:

The Mission of the Clerk of the Board of Supervisors is to provide the County and its citizens easy access to information and guidance to facilitate fair, equitable and open participation in the decision and policy making of Orange County government.

Strategic Goals:

- Facilitate the decision and policy making of Orange County government.
- Ensure the assessment appeals process is fair, timely and equitable; and promote public understanding of the process.
- Ensure records are maintained, legislative history of the County is preserved and documents are readily available to our clients.

Key Outcome Measures:

Performance Measure	2001 Business Plan Results	2002 Business Plan Target	How are we doing?
PERCENT OF ACCURATE AGENDA TITLES. What: Measurement of COB's accuracy and training. Why: Assesses COB's quality & accuracy in preparing the agenda and identifies areas requiring training.	99.3% of published agenda titles were accurate with no errors.	99.25% of agenda titles are published with no errors.	COB has consistently maintained a high level of accuracy, with improvements to the rate each year.
PERCENT OF ACCURATELY COMPLETED AND TIMELY FILED ASSESSMENT APPEALS APPLICATIONS. What: Indicator of taxpayers' and agents' understanding of applications and process. Why: Measures success of the COB's training and outreach efforts to the public and tax agents.	87.4% of appeal applications were completed accurately and timely filed.	85% of applications accurately completed and timely filed.	Percentage is up from 73% just a few years ago.
PERCENT OF ASSESSMENT APPEAL CLAIMS DECIDED OR WAIVED WITHIN 2 YEAR DEADLINE. What: Indicator of success managing caseload to ensure required actions are taken before legal deadline. Why: Assesses whether policies and procedures result in processing appeals within the statutory deadline.	96% of 2000 appeals have been resolved or waivers received. Cases in litigation included in unresolved. COB anticipates similar results for appeals filed in 2001.	100% of appeals resolved or waivers filed, excluding cases in litigation.	Once the backlog of cases was processed, the COB has been successful in resolving or receiving waivers to meet the statutory deadlines.

At a Glance:

Total FY 2001-2002 Actual Expenditure + Encumbrance:	2,379,998
Total Final FY 2002-2003 Budget:	2,295,634
Percent of County General Fund:	0.10%
Total Employees:	32.00

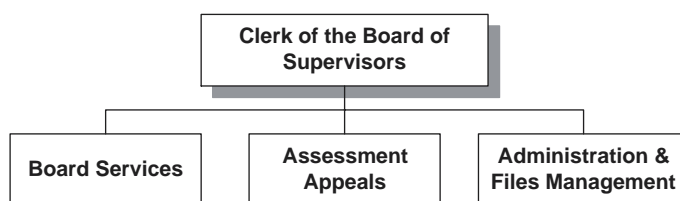
Key Outcome Measures: (Continued)

Performance Measure	2001 Business Plan Results	2002 Business Plan Target	How are we doing?
PERCENT OF ASSESSMENT APPEALS HEARINGS HELD WITHIN ONE YEAR OF FILING. What: Indicator of efficiency in processing and scheduling appeals. Why: Measures COB's success in achieving its customer service goal.	99.5% of 2000 and 100% of 2001 filings held initial hearings within one year, excluding those with applicant waivers filed.	100% of hearings scheduled within one year, excluding filings with applicant waivers.	With filings remaining at a manageable level for several years, COB has been successful in providing this level of client service.
RESULTS OF CUSTOMER SATISFACTION SURVEYS. What: Measurement of success in meeting clients' needs. Why: Assesses COB's success in meeting the needs of its customers in a professional and courteous manner.	COB has received favorable ratings from 95%-100% of respondents.	100% rating of services as good or better.	COB has continually received favorable ratings from its clients.

Fiscal Year FY 2001-2002 Key Project Accomplishments:

- Successfully completed pilot project for Comprehensive Agenda Management Solution and began Countywide training and implementation.
- Continued Assessment Appeals public outreach program through community workshops, updated brochures and instructions and participation in Small Business Tax Workshop.
- Continued participation with Property Tax Administration departments in implementation of long-term vision utilizing e-commerce.
- Enhanced website to provide additional online forms and information to the public.
- Conducted Conflict of Interest workshop for County and non-County agencies.

Organizational Summary



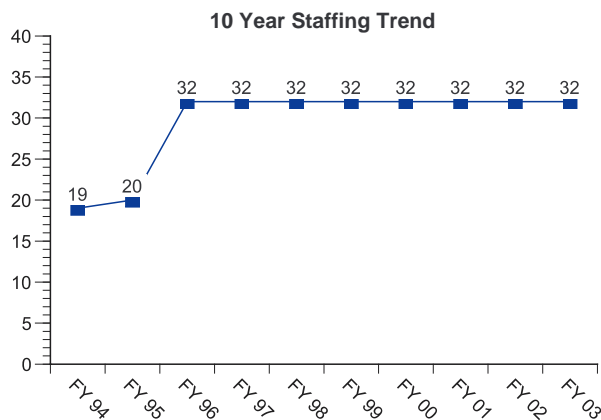
COB - EXECUTIVE - Provides leadership and vision, management oversight and direction to all COB functions; performs administrative functions including budget preparation and monitoring, strategic financial projections, human resources, legislative analysis, prepares business plan and monitors progress in meeting goals and performance indicators.

BOARD SERVICES - Prepares and publishes agendas for Board of Supervisors and other authorities in accordance with legal requirements for public meetings; records and publishes actions taken by the Board; maintains official rosters of Boards, Commissions and Committees; processes legal publications, postings and notices; receives and administers bid openings for County projects; administers oaths of office for various elected and appointed officials and employees; serves as filing officer for Statement of Economic Interest forms; receives and processes claims, summons and complaints against the County.

ASSESSMENT APPEALS - Receives and processes assessment appeal applications; schedules hearings in accordance with legal requirements; prepares minutes and processes actions of the Appeals Boards and Hearing Officers; provides assistance and education on the assessment appeals process to the general public and professional groups through workshops, brochures and the Internet.

ADMINISTRATION/FILES MGT - Provides files management for all records that the Clerk of the Board is required to maintain; assists County staff and the public with research and retrieval of information; provides technical knowledge and coordination in development and implementation of automation projects; provides end-user system support services; performs purchasing and petty cash functions for COB and the Board of Supervisors Offices.

Ten Year Staffing Trend:



Ten Year Staffing Trend Highlights:

- Increase to staffing in FY 95-96 due to transfer of assessment appeals intake function from the Assessor. COB has been able to maintain level staffing since that time, largely due to automation of previously labor-intensive activities.

Budget Summary

Plan for Support of the County's Strategic Priorities:

Requested FY 02-03 budget is consistent with and represents the resources anticipated to accomplish 2002 Business Plan goals.

Through use of automation COB has been able to reduce ongoing operational costs and maintain level staffing. We will continue to pursue automation where efficient and cost-effective.

Changes Included in the Base Budget:

Services & Supplies request has been reduced for one-time items included in 01-02 budget: \$100,000 for implementation of Comprehensive Agenda Management System and \$325,000 for Planning Commission Room remodel funds that were transferred to the Capital Projects 036 budget as a mid-year adjustment.

Increase in salaries and employee benefits budget is primarily due to negotiated salaries and higher benefit rates, as well as lower vacancies due to recent successful recruitments and few turnovers during this year.

Final Budget and History:

Sources and Uses	FY 2000-2001 Actual Exp/Rev	FY 2001-2002 Final Budget	FY 2001-2002 Actual Exp/Rev ⁽¹⁾	FY 2002-2003 Final Budget	Change from FY 2001-2002 Actual	
					Amount	Percent
Total Positions	-	32	32	32	0	0.00
Total Revenues	750,284	44,400	64,974	45,613	(19,361)	-29.80
Total Requirements	2,019,131	2,425,121	2,423,866	2,295,634	(128,232)	-5.29
Net County Cost	1,268,847	2,380,721	2,358,892	2,250,021	(108,871)	-4.62

(1) Amounts include prior year expenditures and exclude current year encumbrances. Therefore, the totals listed above may not match Total FY 2001-02 Actual Expenditure + Encumbrance included in the "At a Glance" section.

Detailed budget by expense category and by activity is presented for agency: Clerk of the Board in the Appendix on page 584.

Highlights of Key Trends:

- COB will continue to pursue automation for cost-savings, efficiencies, and to enhance access to information and services.
- Assessment Appeal filings have remained at a manageable level for several years, but can be impacted in the future by economic, legislative and legal factors.

Budget Units Under Agency Control

No.	Agency Name	Cob - Executive	Board Services	Assessment Appeals	Administration/Files Mgmt	Total
011	Clerk Of The Board	316,291	467,782	916,105	595,456	2,295,634
	Total	316,291	467,782	916,105	595,456	2,295,634